Supplier - Special Order Entry in LOOP Quick Reference Guide

Introduction

Vendor Buyer places order in LOOP	LOOP validates order and notifies approver	Licensee approver approves order	Order integrates to Wholesale Order Management (OM)

- The supplier representative authorized by the licensee to place orders on behalf of the licensee will enter the following details for an order:
    - License Identification (LID) Number
    - Delivery method
    - Item(s)
    - Customer purchase order (PO) number (from licensee, if available)
    - Special instructions (if applicable), which will be visible to the licensee
    - Supplier-imposed shipping fee (for direct delivery orders only), if any

- The Licensee Online Order Portal (LOOP) will calculate pricing and update the Cart Summary with totals.

- Once the order has been created, LOOP will send a notification to the licensee.

- The licensee will review and approve or reject the order and optionally update the payment method, releasing it for processing.

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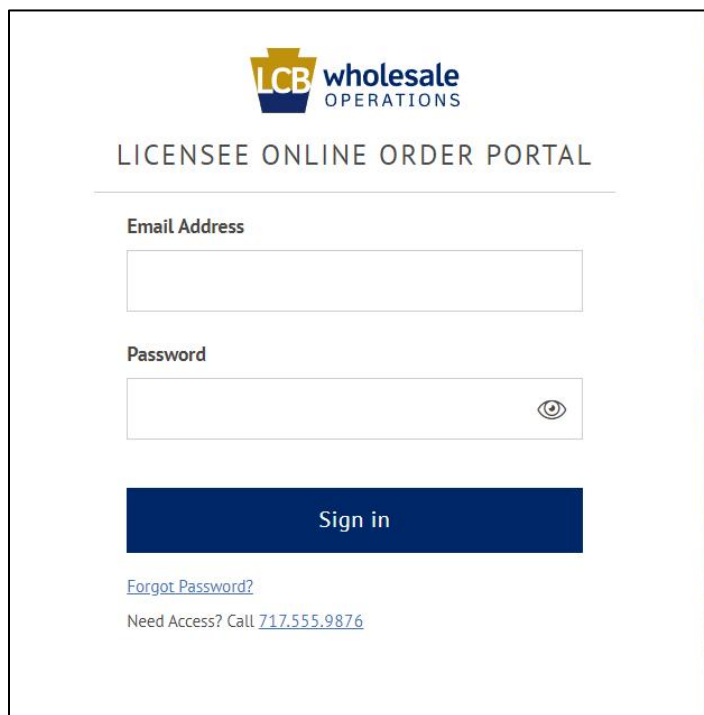
| Acronym	Meaning
LID	License Identification Number
LOOP	Licensee Online Order Portal
LTMF	Logistics, Transportation & Merchandising Factor
PLCB	Pennsylvania Liquor Control Board
PO	Purchase Order
SO	Special Order

Supplier Special Order Entry in LOOP

Link to eLearning video: Supplier – Special Order Entry in LOOP

Create Licensee Special Order

1. Log in to the Licensee Online Order Portal (LOOP) with registered credentials.
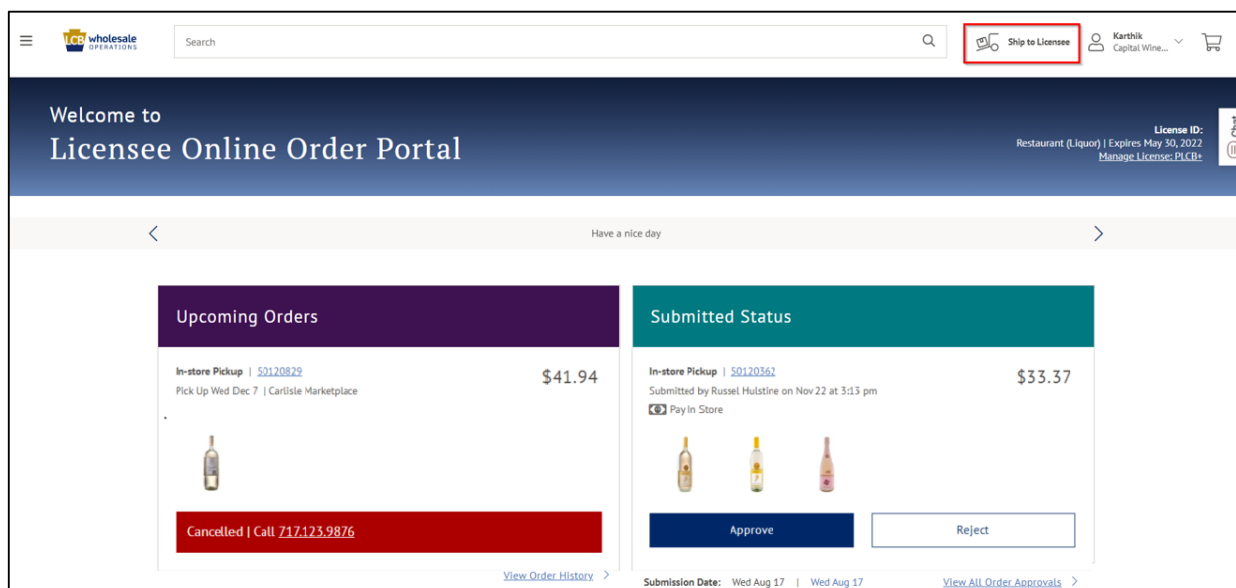
The LOOP Dashboard is displayed after log in.

2. Click **Change LID** in <u>Profile</u> to select the licensee for which the order is being placed.

Vendor buyers may be associated with multiple licensees, each with a LID. Once logged in, the supplier must select the licensee for which they are creating the order.
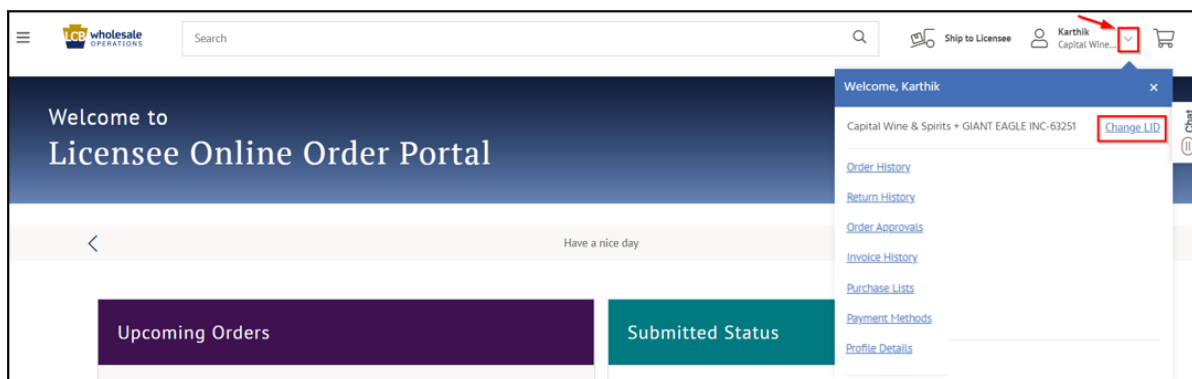
A small pop-up window will appear.

3. Click **Select**.

Note: Filter LID in the search bar or scroll through the list to select a licensee. Only licensees that have authorized the supplier to place Special Orders on their behalf are available to select.

4. Search an item by using the browse option. Click the **Menu Icon** on the top left corner.
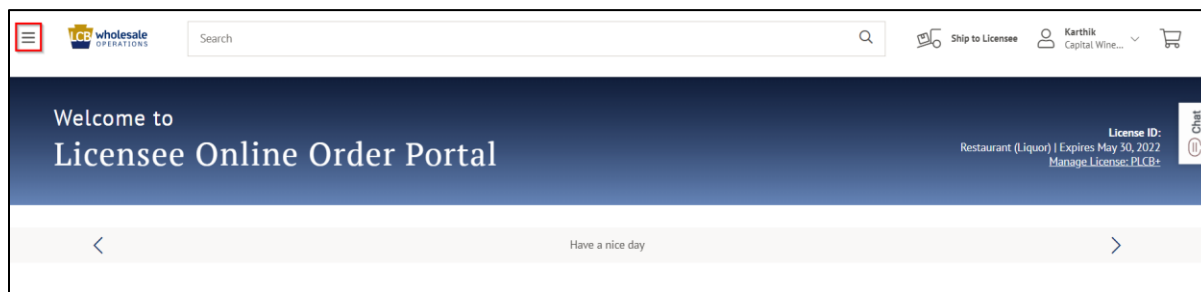
Note: The menu icon is available in the upper left corner of the screen, where users can access product navigation information.

5. Select an item by navigating through the Item Catalog.
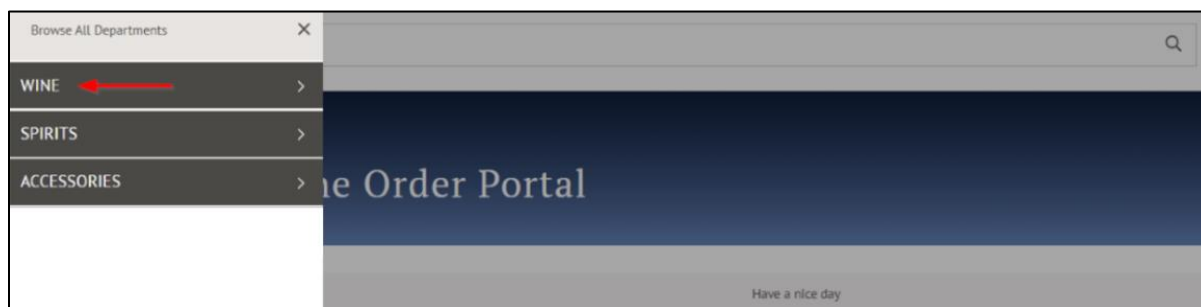
6. Alternatively, search for a particular item using the Search Bar.
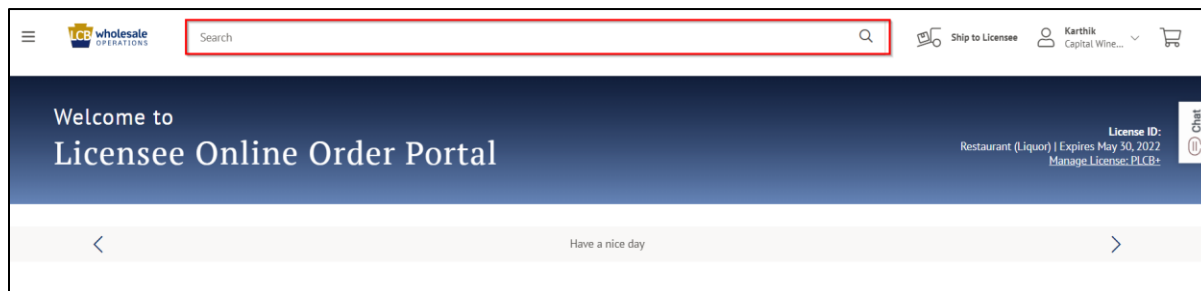
7. Click the **"+" Icon** to increase or the **"–" Icon** to decrease the quantity of a selected item.
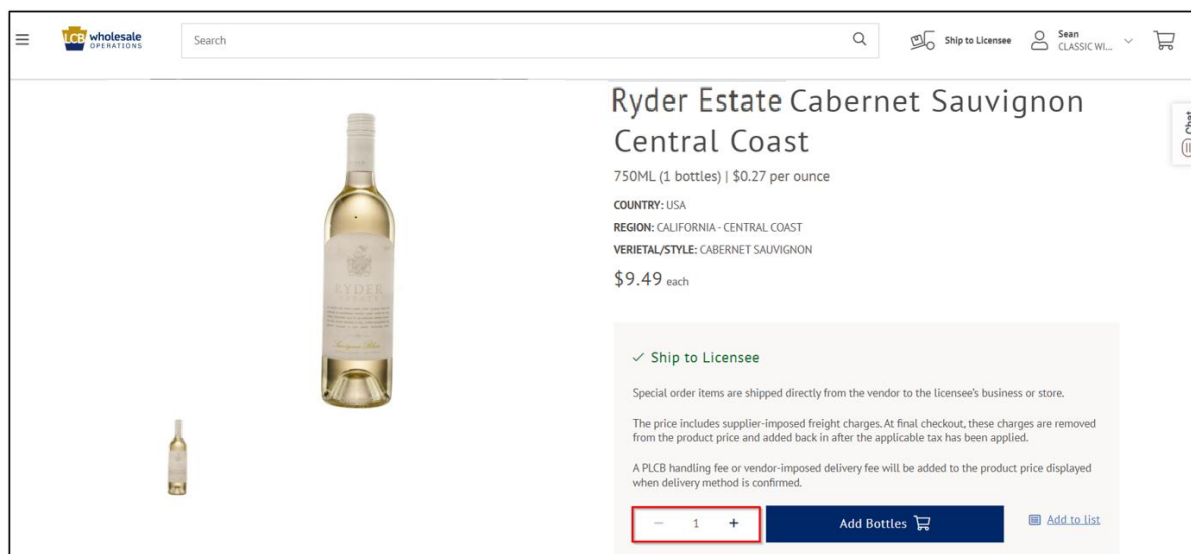
8. Click **Add Bottles**.
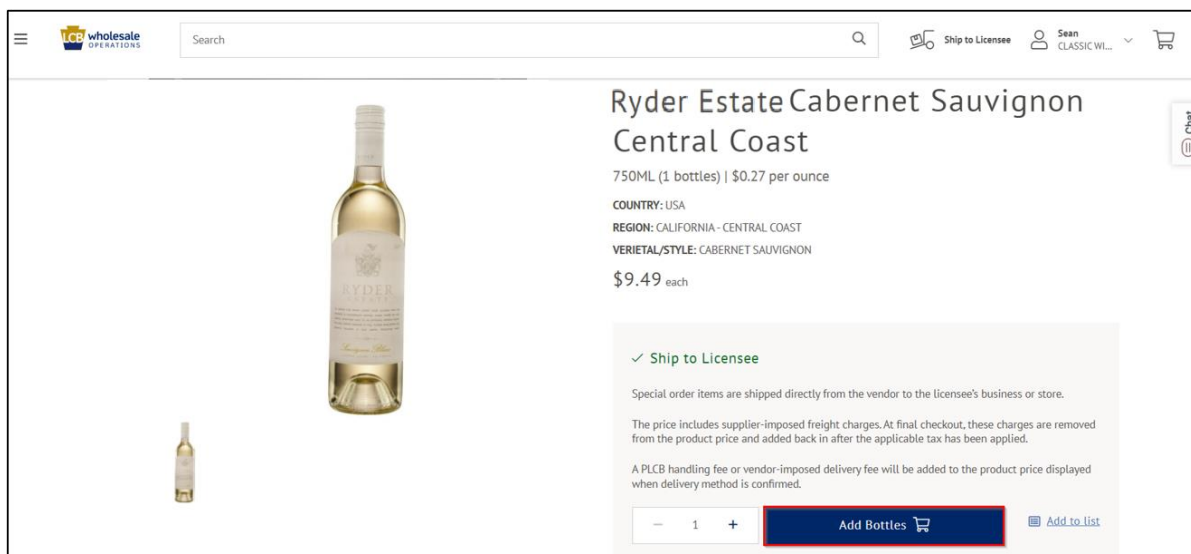
9. Click the **Shopping Cart Icon**.
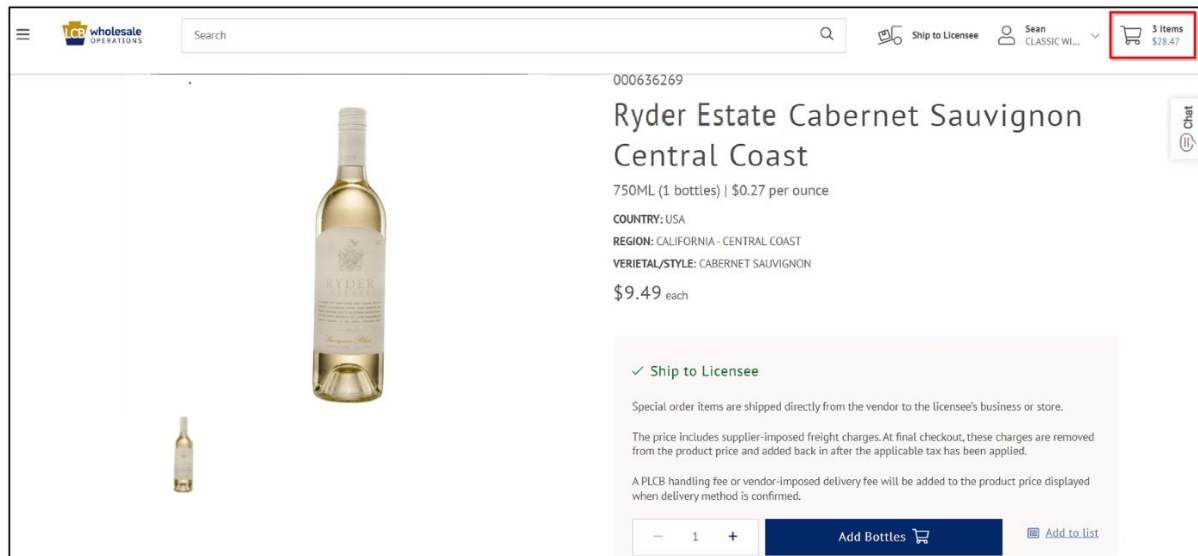
10. Alternatively, click **Download a CSV Template** to perform bulk order upload on the Landing Page (as shown in the screenshot below).
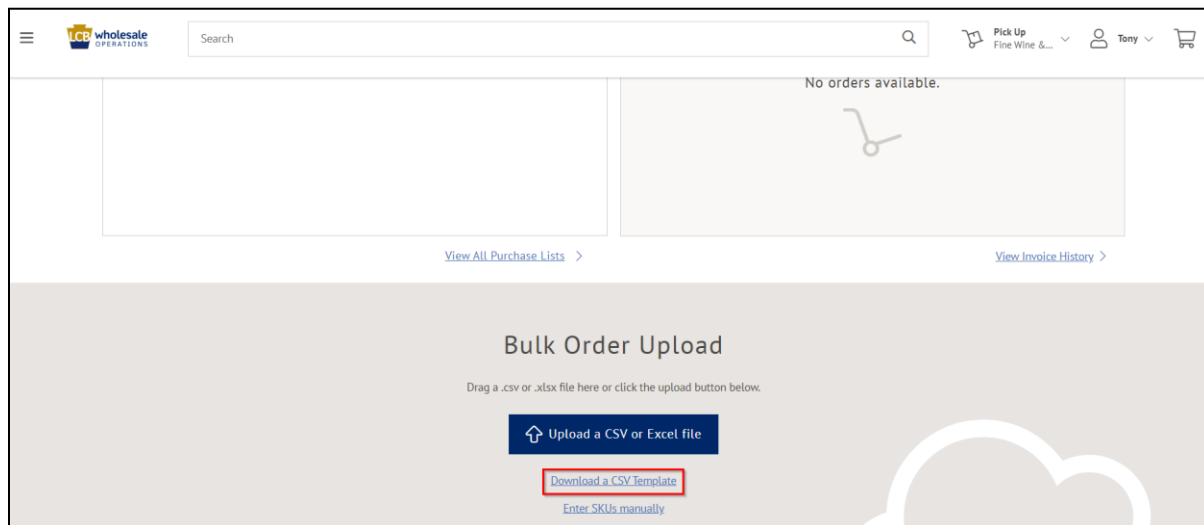
11. Alternatively, click **Enter SKUs manually** on the <u>Landing Page</u> (as shown in the screenshot below).
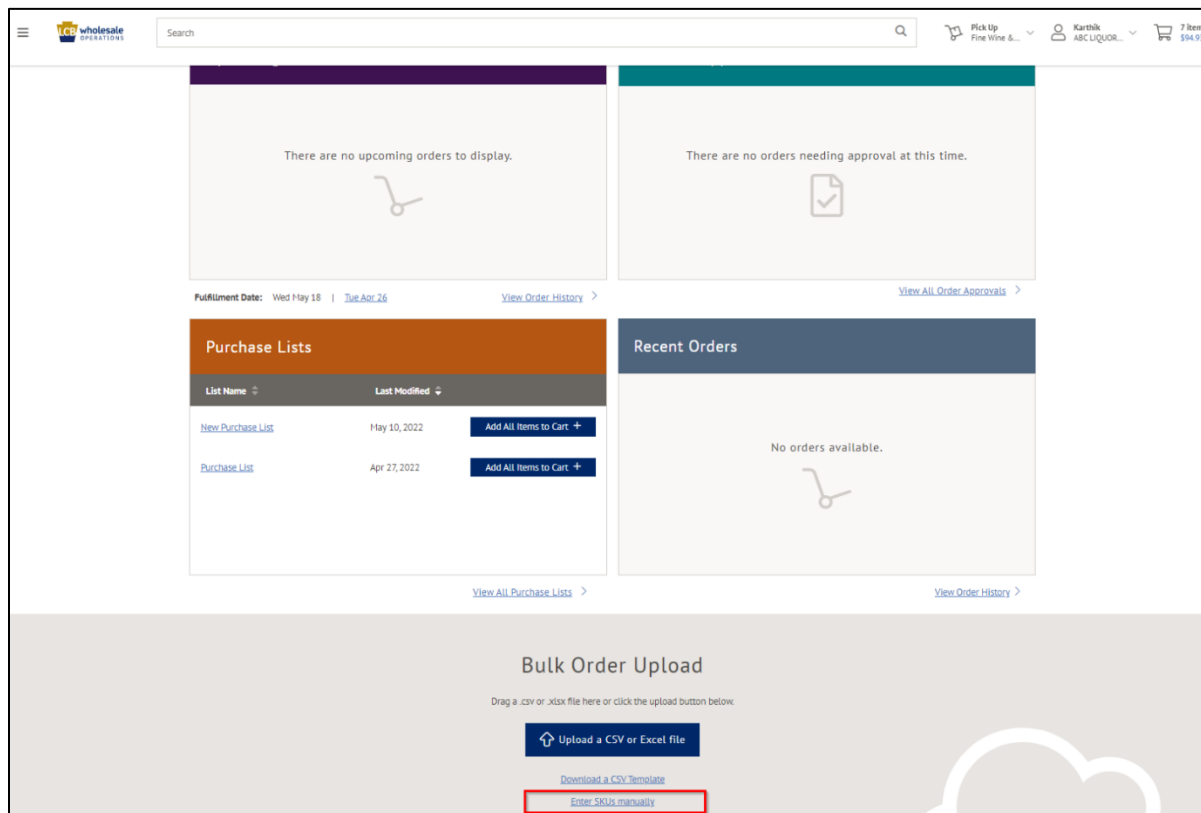
A pop-up window will appear.

12. Enter the [nine-digit PLCB Item Number], then select the product.
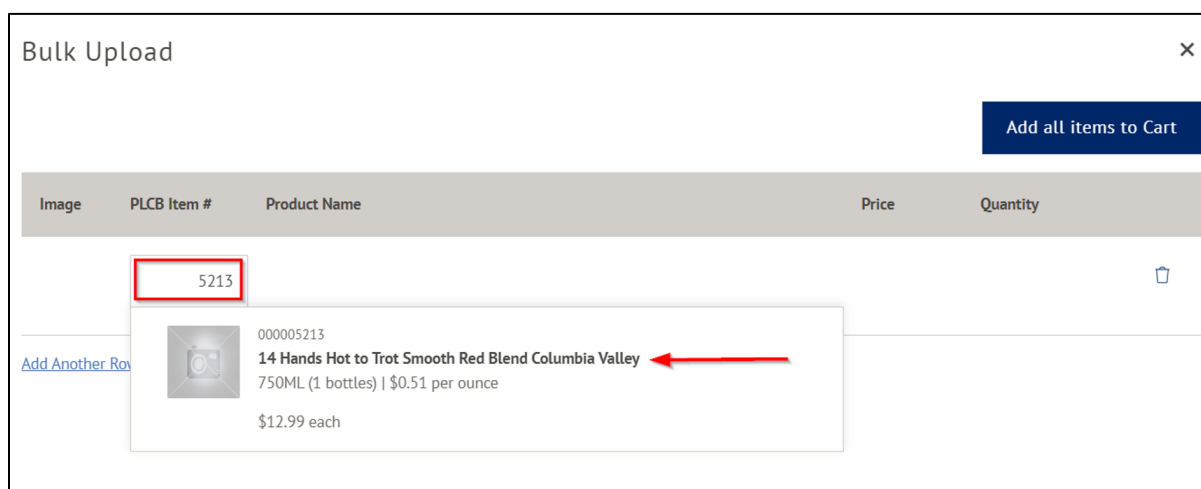
13. Click **Add Another Row** to add additional products.

Bulk Upload   ✕

                                              Add all items to Cart

Image	PLCB Item #	Product Name	Price	Quantity
	5213	000005213 **14 Hands Hot to Trot Smooth Red Blend Columbia Valley** 750ML (1 bottles) | $0.51 per ounce	$12.99 each	− 1 + 🗑

Add Another Row

14. Click the **"+" Icon** to increase or the **"−" Icon** to decrease the quantity of a selected item.

Bulk Upload   ✕

                                              Add all items to Cart

Image	PLCB Item #	Product Name	Price	Quantity
	5213	000005213 **14 Hands Hot to Trot Smooth Red Blend Columbia Valley** 750ML (1 bottles) | $0.51 per ounce	$12.99 each	− 1 + 🗑

Add Another Row

15. Click **Delete** to remove the item.

Bulk Upload   ✕

                                              Add all items to Cart

Image	PLCB Item #	Product Name	Price	Quantity
	5213	000005213 **14 Hands Hot to Trot Smooth Red Blend Columbia Valley** 750ML (1 bottles) | $0.51 per ounce	$12.99 each	− 1 + 🗑

Add Another Row

16. Click **Add all items to Cart**.

17. Validate the Shopping Cart.

Notes: A shopping cart can be modified by increasing or decreasing the item quantity.
Click "Remove" to delete an item from the cart.

18. Click **Continue to Checkout**.

19. On the <u>Checkout Screen</u>, validate for direct delivery details and optionally enter a delivery fee, or select **PLCB Store** for store delivery. Once a delivery fee is added, the cart summary will update to reflect this fee.

Optionally enter PO Number or Special Instruction, which will be visible to the licensee.

Selecting **PLCB Store** to enable store pickup will automatically add the PLCB Handling Fee (LTMF) to the cart summary.

A pop-up window will appear.

20. Enter [Zip], [City] or [Address] to find the desired store.
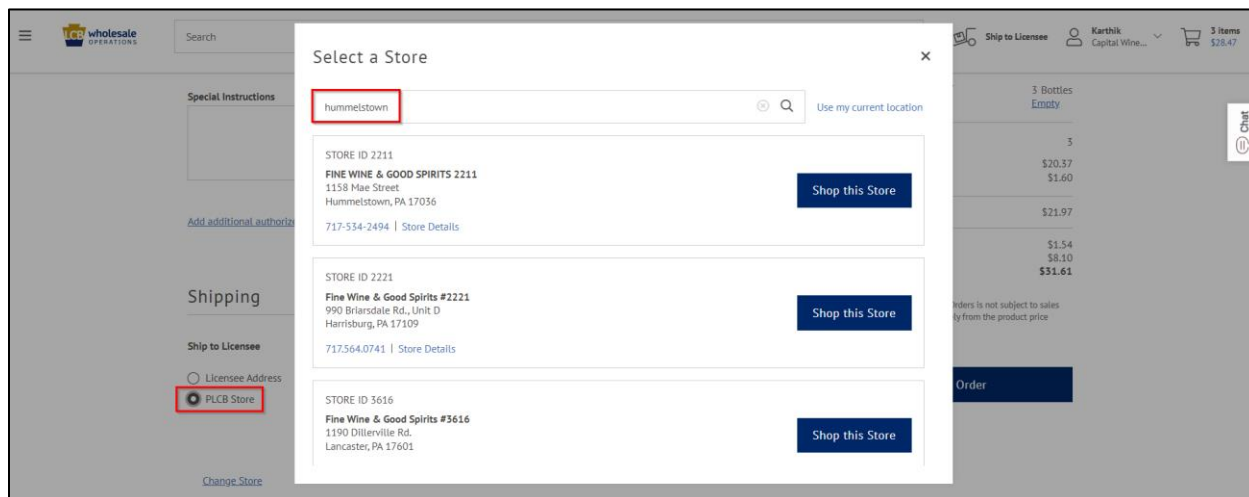
21. Click **Shop this Store**.
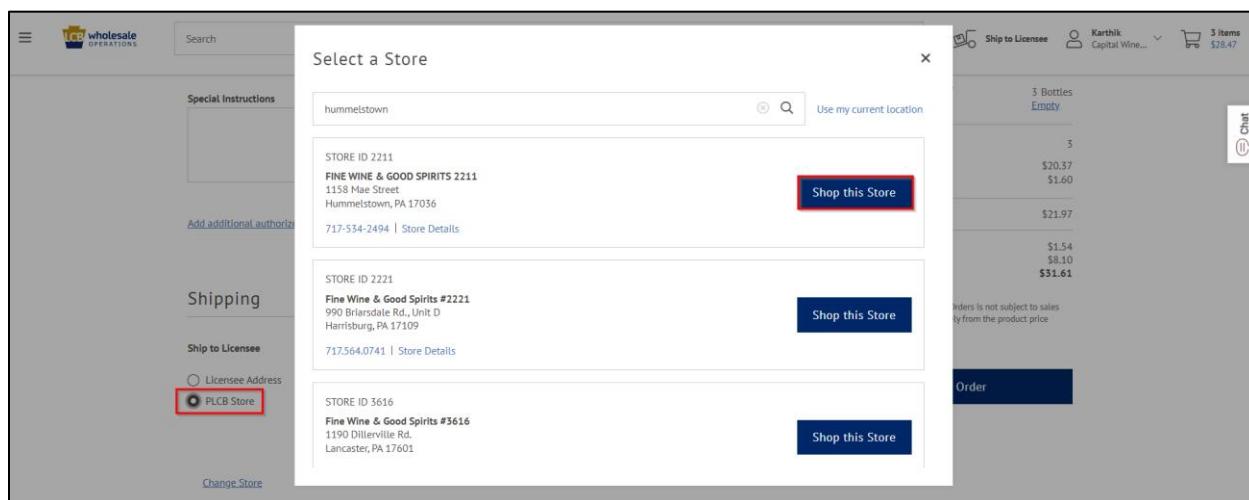
22.	After completing the shipping section, click **Place Order**.

23.   View the <u>Order Confirmation Page</u>.

Notes: Based on shipping selection (direct delivery or store pickup), the Supplier-Imposed Shipping Fee or PLCB Handling Fee, respectively, will be listed in the totals, as well as SO Freight, broken out separately for tax purposes.

The licensee is then notified of the order ready for review.

24. Click the **PLCB Logo** to return to the homepage.

Populate New Order from Existing Order

1. Log in to the Licensee Online Order Portal (LOOP) with registered credentials.

2. Navigate to Profile. Click the **Down Arrow Button**, then click **Order History**.
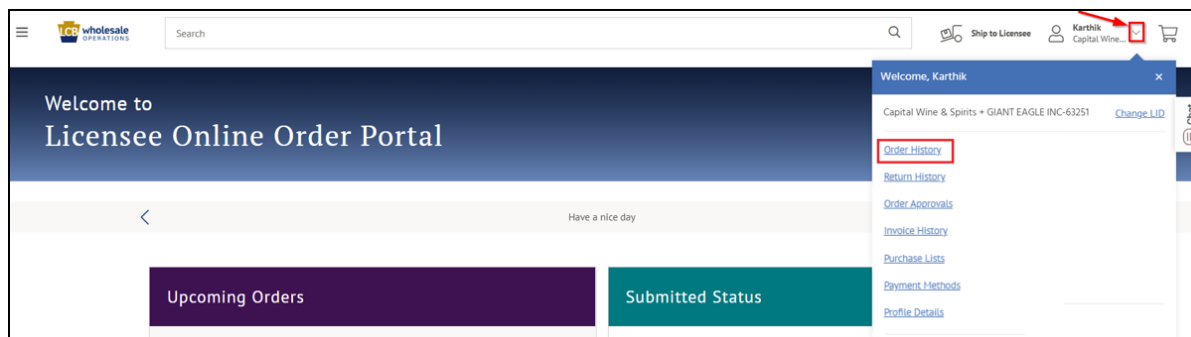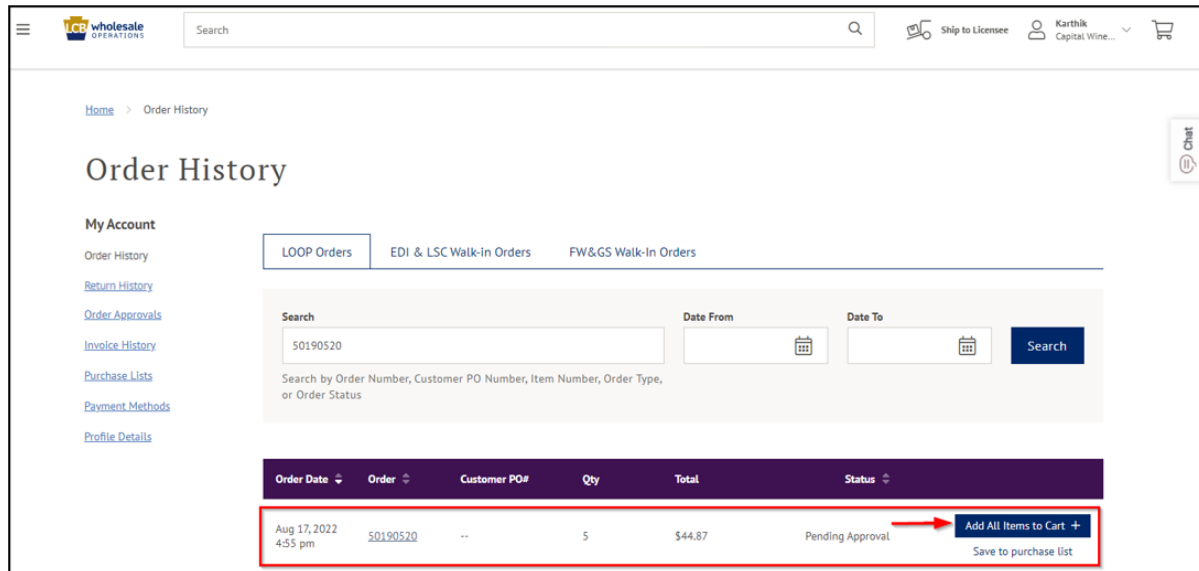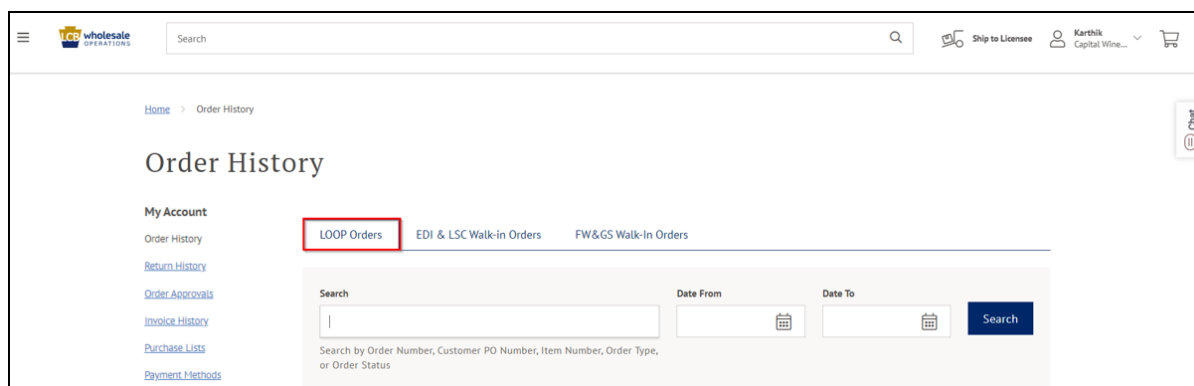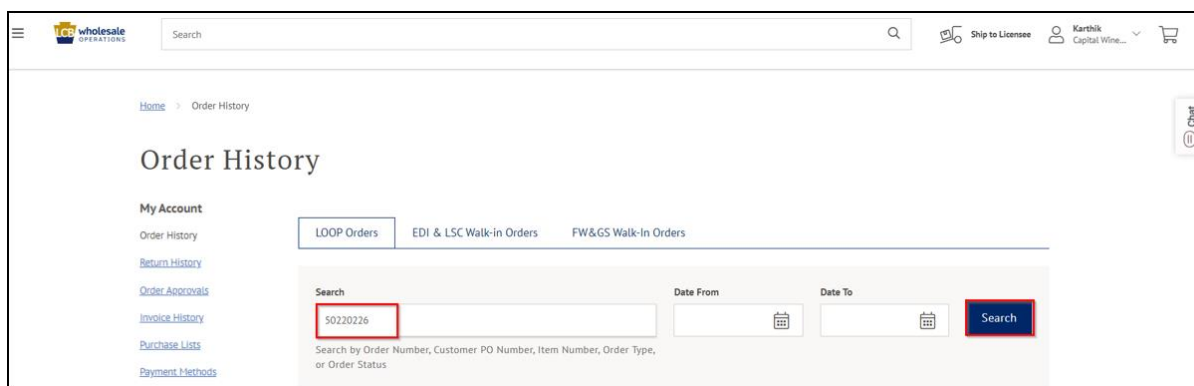

3. Select the **LOOP Orders Tab**.
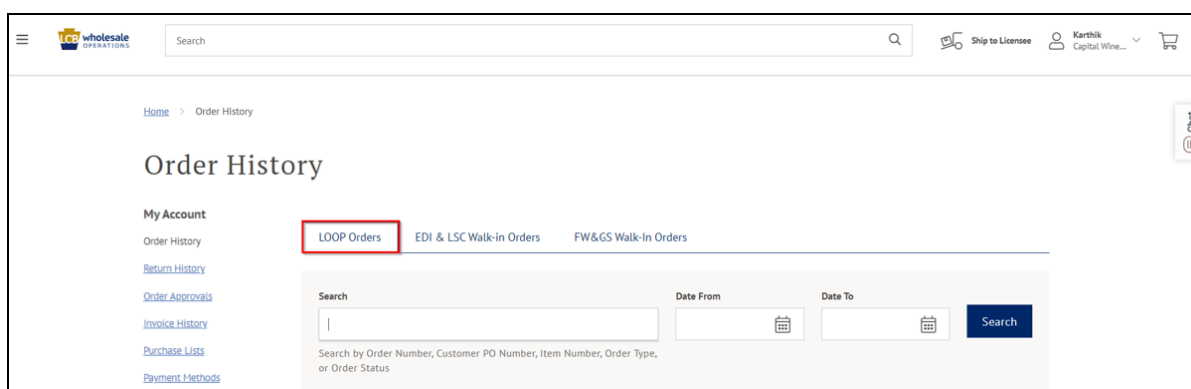
4. Enter [Order Number]. (Alternatively, enter [Customer PO Number], [Item Number], [Order Type], [Order Status] or [Date Range]) in the Search Section, then click **Search**.
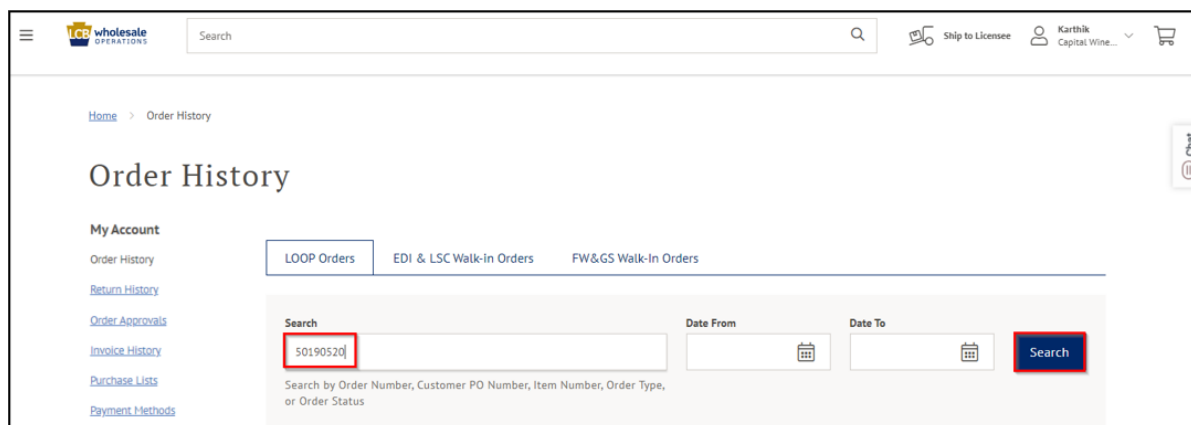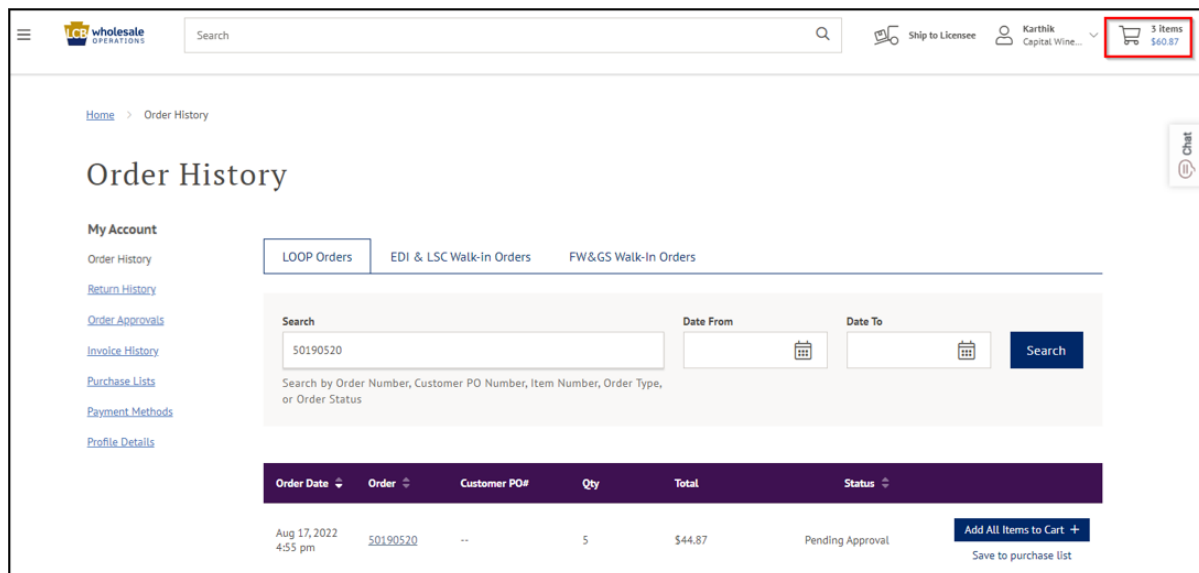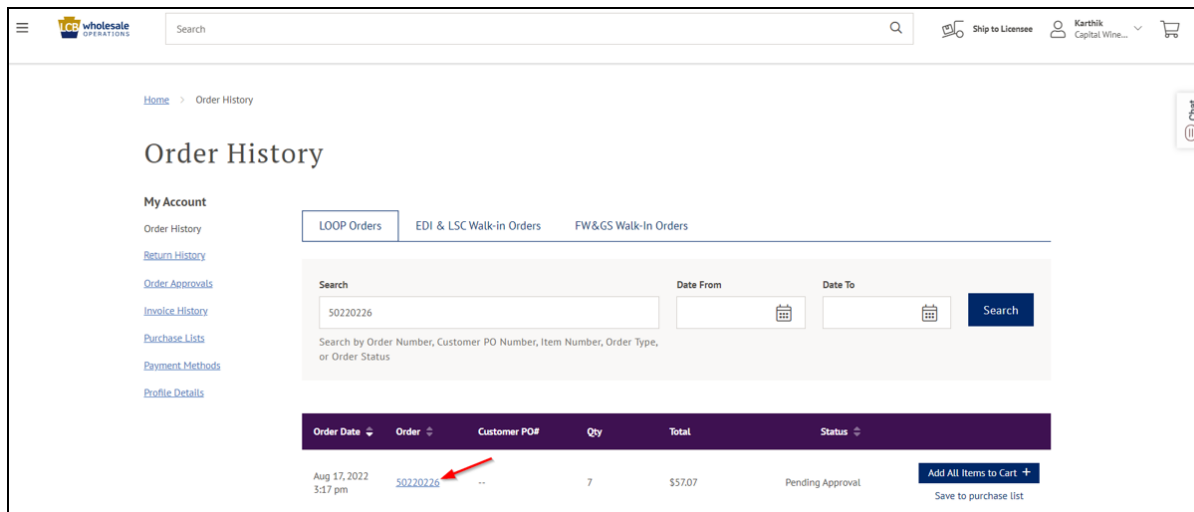
4. Select an order, then click **Add All Items to Cart +**.

5. Click **Shopping Cart**.

Populates the cart with items and quantities of the selected order.

6. Validate <u>Shopping Cart</u>, then click **Continue to Checkout**.

Note: Once the cart is created, the supplier will be able to make changes (including adding, removing and adjusting lines) and continue shopping, then proceed with checkout as previously detailed.

View Placed Special Orders

1. Log in to Licensee Online Order Portal (LOOP) with registered credentials.

2. Navigate to <u>Profile</u>. Click the **Down Arrow Button**, then click **Order History**.
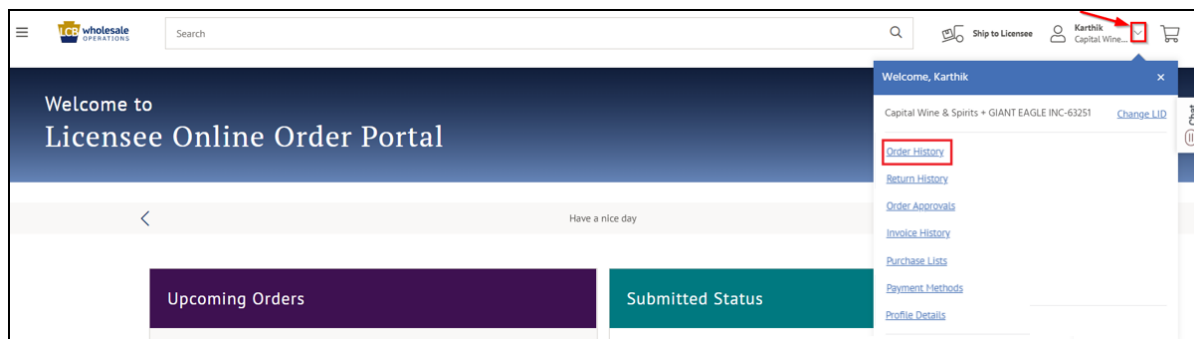
3. Select the **LOOP Orders Tab**.

4. Enter [Order Number]. (Alternatively, enter [Customer PO Number], [Item Number], [Order Type], [Order Status] or [Date Range]) in the <u>Search Section</u>, then click **Search**.

5. Review the results.

View Special Order Details

1. Follow steps above to find the order for which you want to view details.

2. Select the order number by clicking the hyperlink.

3. Review the order details.